Purchasing platform
CONNECT

CONNECT Manual – problems reporting

Version: 3.14

1. Table of contents

2. Introduction

The manual is intended for system's users related to the operation of purchasing processes and it concerns a way of reporting and handling problems by using the tool located in the functionality of the Connect Platform.

Users of the Connect Platform will have a possibility to report a problem directly from the Connect system by the appropriate form; they will also have an access to all tickets registered by themselves on the appropriate list in the menu.

Properly registered ticket will be implemented. During implementation a reporting user may be asked to accept the so called session of a remote access. During this session, implementing user will have an opportunity to observe all actions performed in the Connect system by the reporting user.

3. Problems reporting

Possibility to report problems which appear while working on the Connect Purchasing Platform is available for each system's user after being logged in.

To report a problem while working on the Connect Purchasing Platform, user should select the option: Submit ticket, available from each level of the application, which is located in the footer of the page. The option: **Submit ticket** is also available on the list: **Reported Problems**, described later in the manual.

Picture 1 Reporting a problem

After selection of the option described above, a **Ticket report form** is displayed, where the following fields must be completed:

- **Ticket name** (for the general description of the problem);
- **Does the ticket relates to the purchasing process?** (a drop-down list YES/NO);
- **Number of the purchasing process –** the field is available if on the list: **"Does the ticket relates to the purchasing process?"** the option: "YES" has been selected. Number of the

purchasing process must be consistent with the format obligatory on the Connect Purchasing Platform: Company's symbol/2/xxxxxx/xx, e.g. ORL/2/ 000001/14;

- **Ticket description** – for detailed description of the problem;
- **Contact's e-mail –** a field completed automatically basing on the e-mail address of the user reporting a given problem;
- **Attachments –** a field which enables to attach files to the ticket needed for the user implementing a given problem, e.g. screenshot.

Picture 2 Form of reporting a problem

After completing the Problem Reporting Form, select the Save option to register the request on the Connect Platform.

Picture 3 Registration of the reported problem

After the problem is properly reported, the form, which confirms its registration on the Connect Platform, is displayed. From the level of the confirmation form it is possible to go directly to the registered ticket.
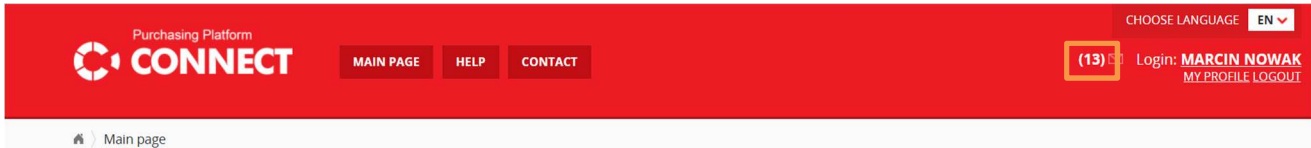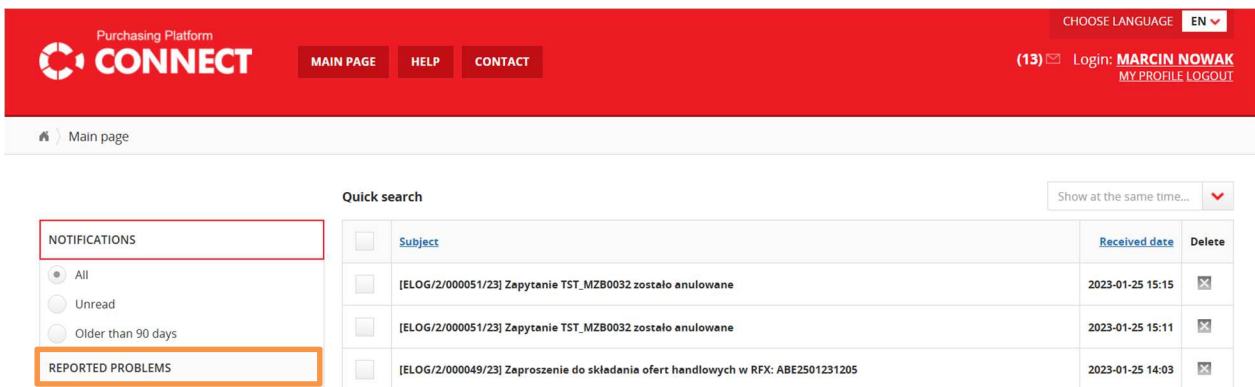

Picture 4 Confirmation form of the reported problem

Tickets registered by the given user are located on the list **Reported Problems** available in the main menu.

After clicking the envelope icon in the upper right corner of the screen. Next to the first and last name of the logged user.

Picture 5 Access to the Notification section

Picture 6 Reported Problems list – entry through the Notification section

The tickekts can have the following statuses:

- **New –** new, properly registered ticket on the Connect Platform;
- **In process –** a ticket with the assigned Implementing user
- **Processed –** tickets solved by Implementing users.

The following tabs are available in preview of the given ticket:

- **Information –** includes basic data of the registered problem; in this tab it is possible to add more attachments to the notification – if new attachments are added to the ticket, it should be confirmed by clicking on the icon: **Save;**

Picture 7 Information tab in the ticket

- **Comments** – enables to add comments to the ticket (to add a comment, user has to click on the field: **Add comment** and then select: **Send**); user has also a possibility to receive emails with new comments added to the ticket (to receive such e-mails, user has to mark the option: **Send notifications about comments**). The tab is the only one basic channel of communication with the user who implements a given notification;

Picture 8 Comments in the ticket tab

NOTICE: If user clicks only **"Save"** button without using earlier **"Send"** button, the comment will not be saved.

- **History –** presents changes of statuses in the given ticket, changes of assigned users (Implementing users) and history of the session of remote access.

Picture 9 History tab in the ticket

3.1 Session of the remote access

While implementing of the ticket, a reporting user may be asked to accept a so called session of remote access. The functionality allows the implementer of the ticket to observe (in a preview mode, i.e. – without being able to take control over the user's cursor) all the application's screens

on which the user is moving. According to the Implementer's instructions, user should complete all actions, necessary to diagnose and solve the problem.

User can have only one active session of remote access at a given time.

When the Implementer of the given notification asks a reporting user for a session of a remote access, the screen concerning **Acceptance of remote access request** appears on the main page of the application.

The following information is visible in the acceptance screen for a remote access:

- Status;
- User who asks for an access;
- Sending date;
- Link to the ticket.

If user agrees to start a session of a remote access, he should select the option: **Accept**.

The acceptance of the session is possible after having accepted the clause: "*I am aware, that by accepting the remote access session I agree on the preview of my session in Connect system by Administrator, who is implementing ticket and for recording it.*"

The maximum waiting time for the acceptance of the session of remote access is 60 minutes. The maximum duration of the session is 15 minutes. After that, the first activity in the Connect Platform made by the user to whom the session has been sent, will finish the session.
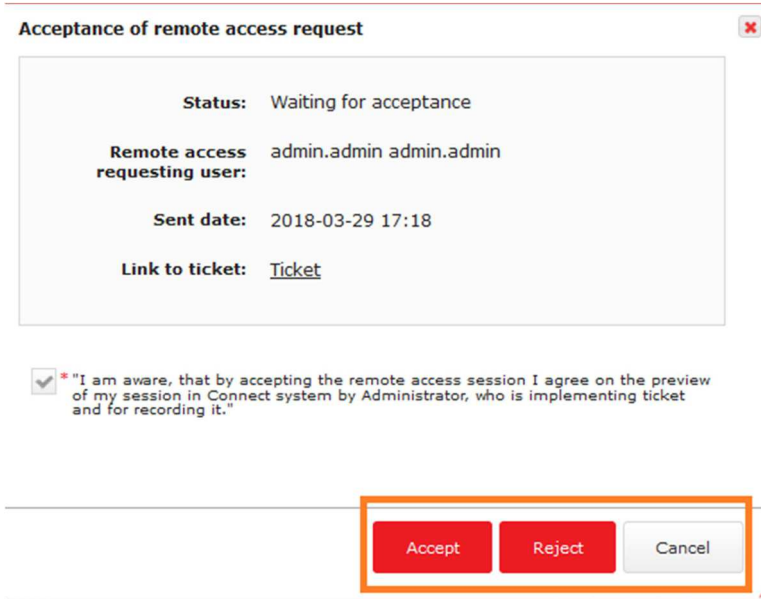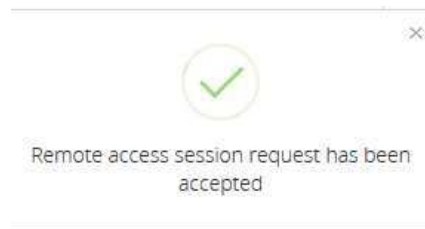
Picture 10 Acceptance of a permission for a remote access

In case of refusal for a session of a remote access, user should select the option **Reject** – then user is obliged to give the reason for rejecting the request of a remote access session.
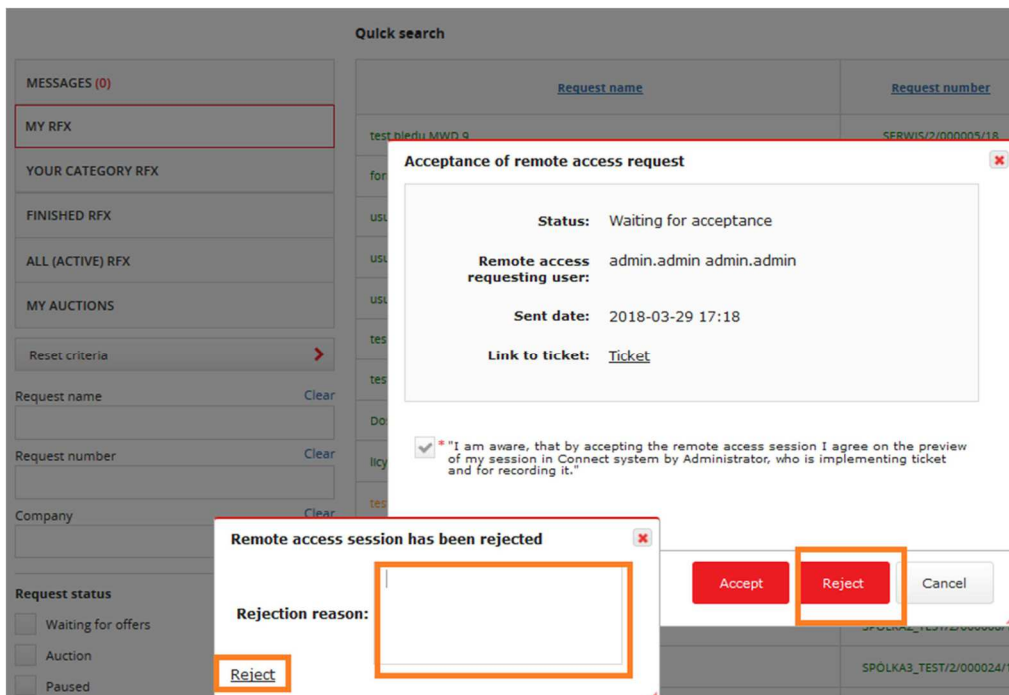
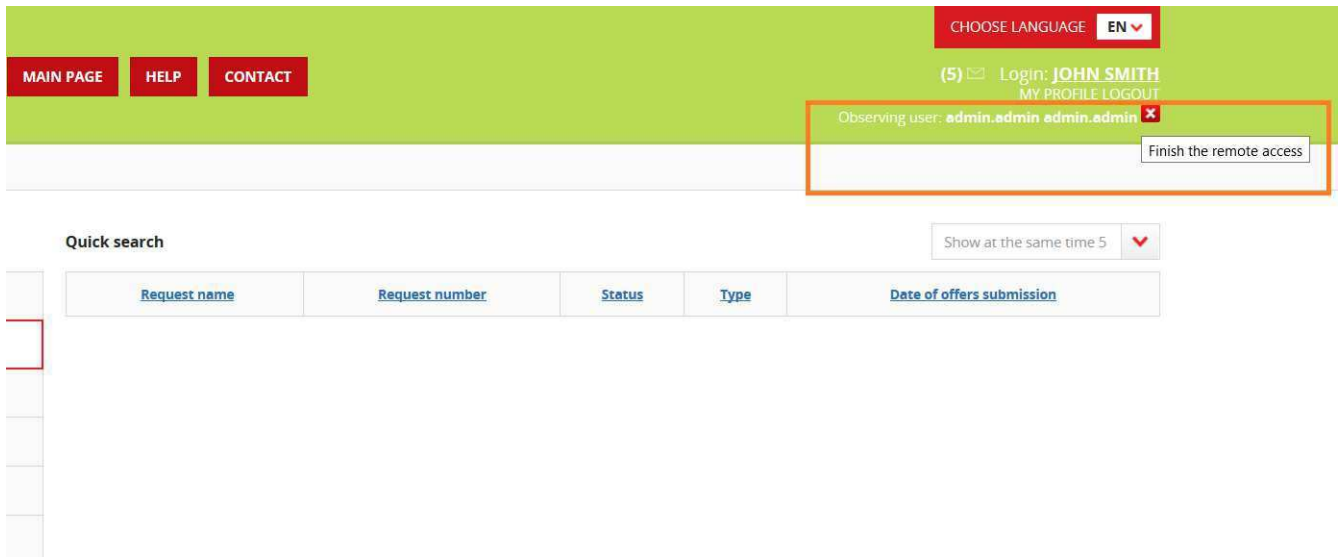**Picture 11** Rejection of a remote access session

If user accepts the permission for a remote access, the following message is displayed:

Picture 12 Accepted permission for a remote access

User should refresh the page by clicking the F5 after accepting the permission for a remote access. During the ongoing session of a remote access, user who accepted it, is informed about the session by:

- **The message on the main page** – presenting basic information concerning the currently ongoing session of a remote access with a possibility to finish it;
- **Changing the colour of the header –** colour of the header changes to green, also information about the user who observes the session of a remote access is presented here; there is also a possibility to finish the session (the icon ___).

Picture 13 View of the main page during the session of a remote access

During the active session of a remote access, user may be asked by the Implementer of the ticket to complete appropriate actions on the Connect Platform, e.g. to go to the particular screen, list in the menu, tab, etc. Those actions are registered (in a preview mode) what enables to solve the problem and appropriate implementation of the ticket.

When user finishes the session of a remote access, he should refresh the page by F5 and make sure if the colour of the header changes to red.

4. List of pictures